The Market for Paragliding Equipment

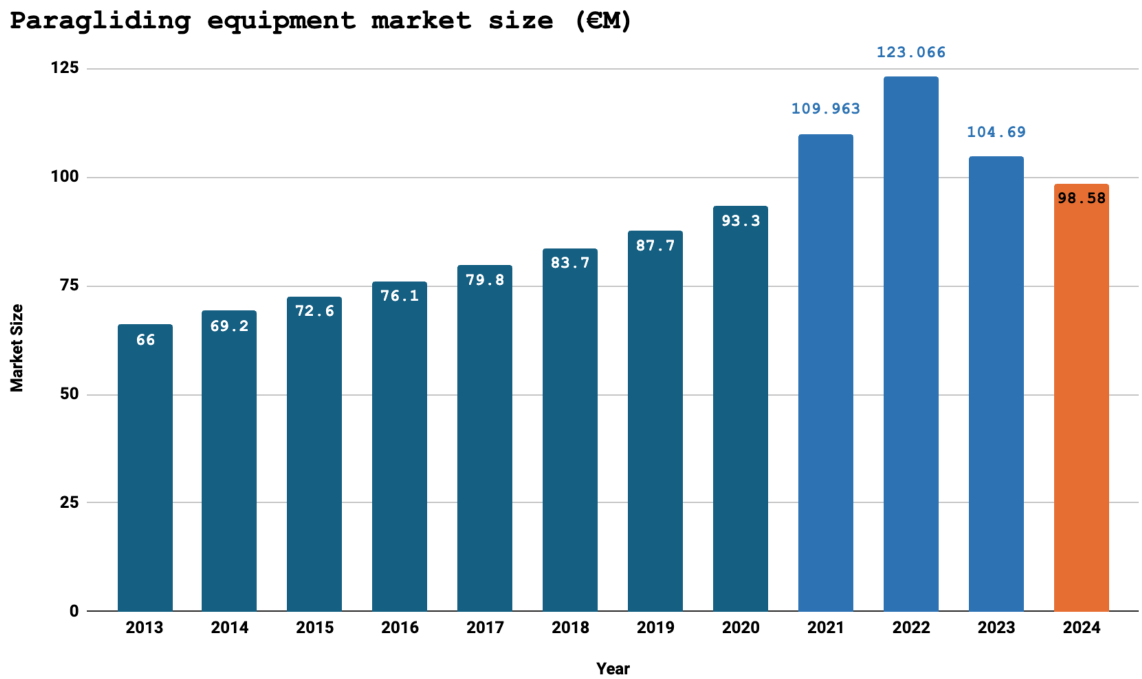
Worldwide Study 2024

UPDATE: July 2025

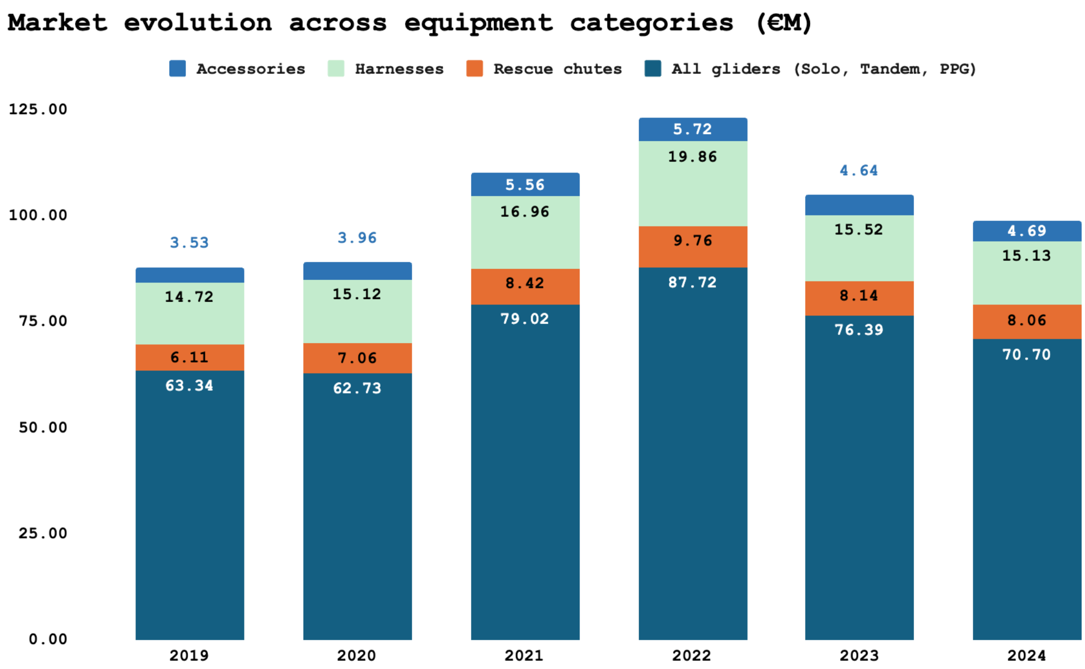
About this Report

This report aims to present the results of the Paragliding Equipment Worldwide Market Analysis, as commissioned by the Paraglider Manufacturers Association (PMA). The year of reference for this report is 2024. Information in this report is based on direct input from paragliding equipment manufacturers corroborated with previous studies and research. Revenue reported is based on the sales of equipment by manufacturers to their direct sales channels and doesn't include data from any other resellers or second hand market.

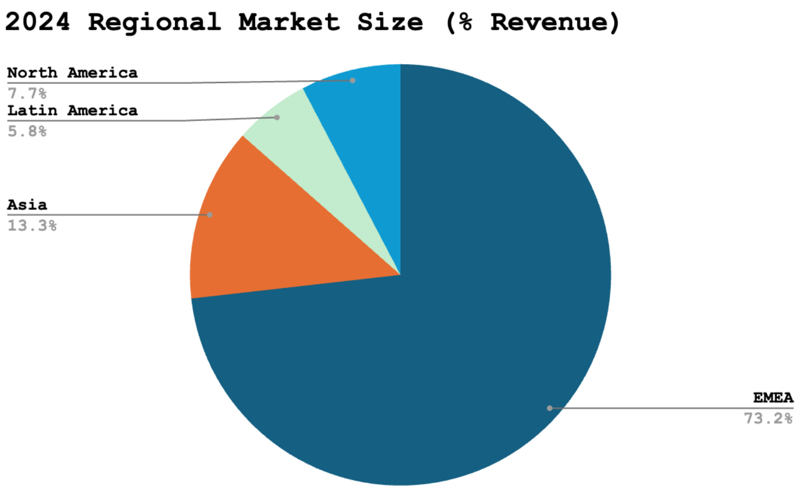
Market Summary Overview

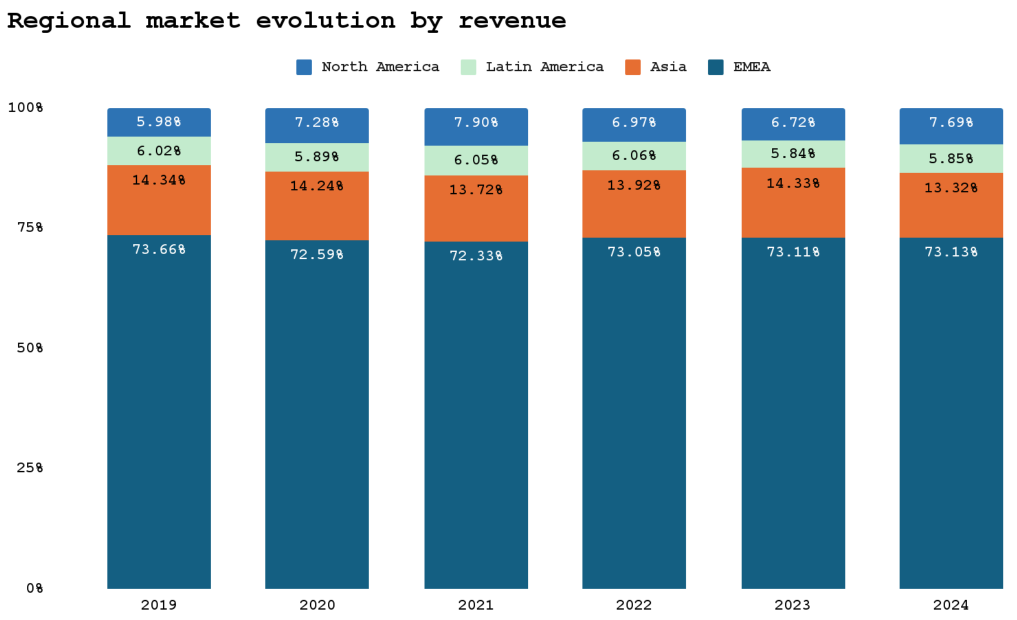


In 2024 the global paragliding market further contracted with ~5.8% reaching an estimated value of €98.5M. This is further compounding the ~15% market size contraction in 2023. This contraction follows the significant post-pandemic-growth period from 2021 & 2022 and a decline compared to the previously ~5% yearly average growth rate.



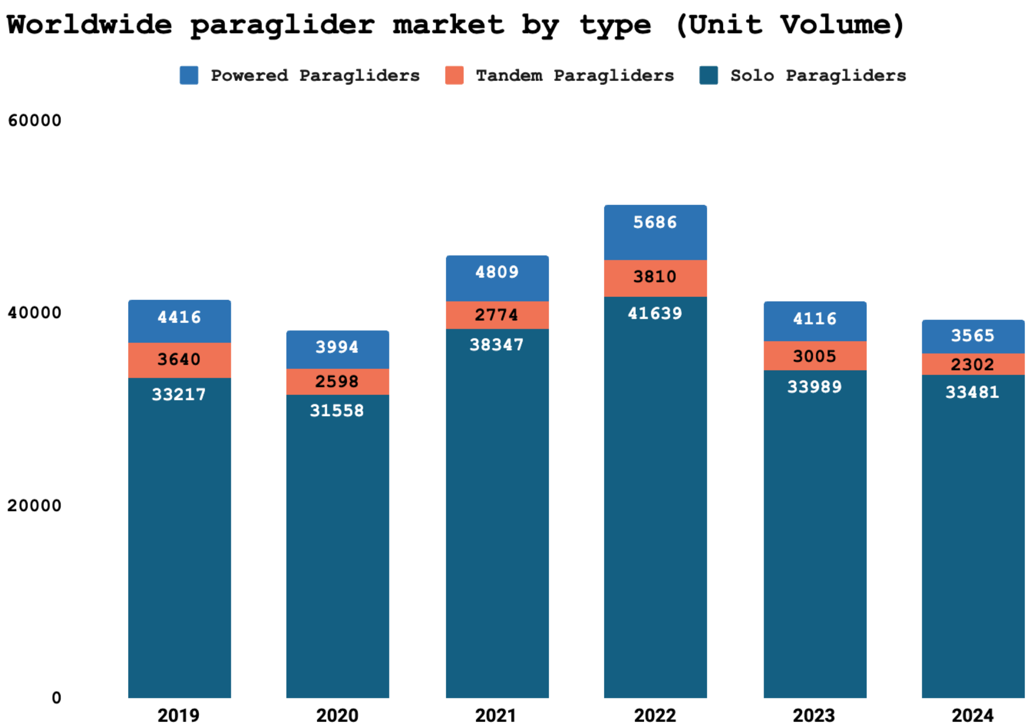
The product category mix remained relatively stable across all categories except for paragliders which showed a significant revenue contraction (~-€5.5M) in 2024, primarily driven by a sharp decline in the higher price-point tandem gliders category (-23% in terms of units). In terms of regional market distribution remains relatively stable for LATAM and EMEA regions. The Asian market has seen a slight decline (-7% contraction vs. 2023 in relative terms), down to ~€13.1M. The North American market continues the steady market growth trend (+14% vs. 2023 in relative terms) up to ~€7.6M.





Paragliders

In 2024, the paraglider market further contracted on average 4.3% in unit volume, largely caused by a decline in Tandem Paragliders (-23%) and Powered Paragliders (-13%) demand. In 2024, solo paragliders account for ~85% of the total paraglider market.



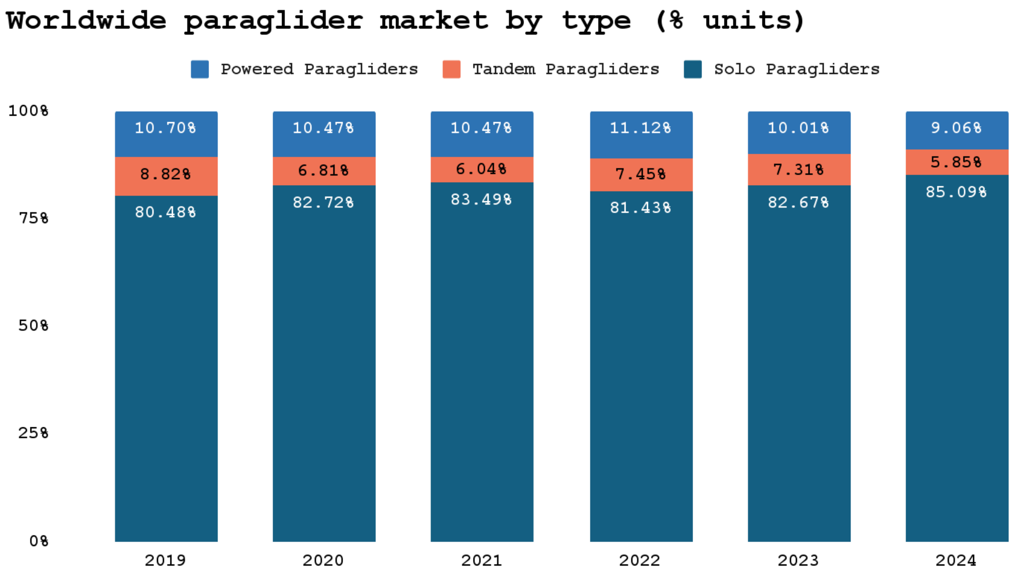
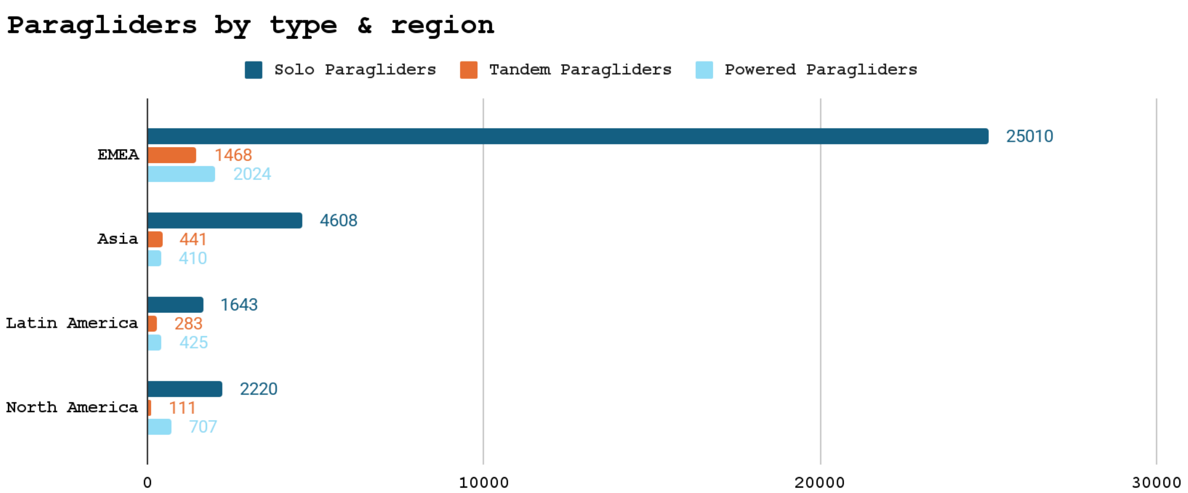


Table 1: Worldwide paraglider sales by type (Unit Volume, Est.)

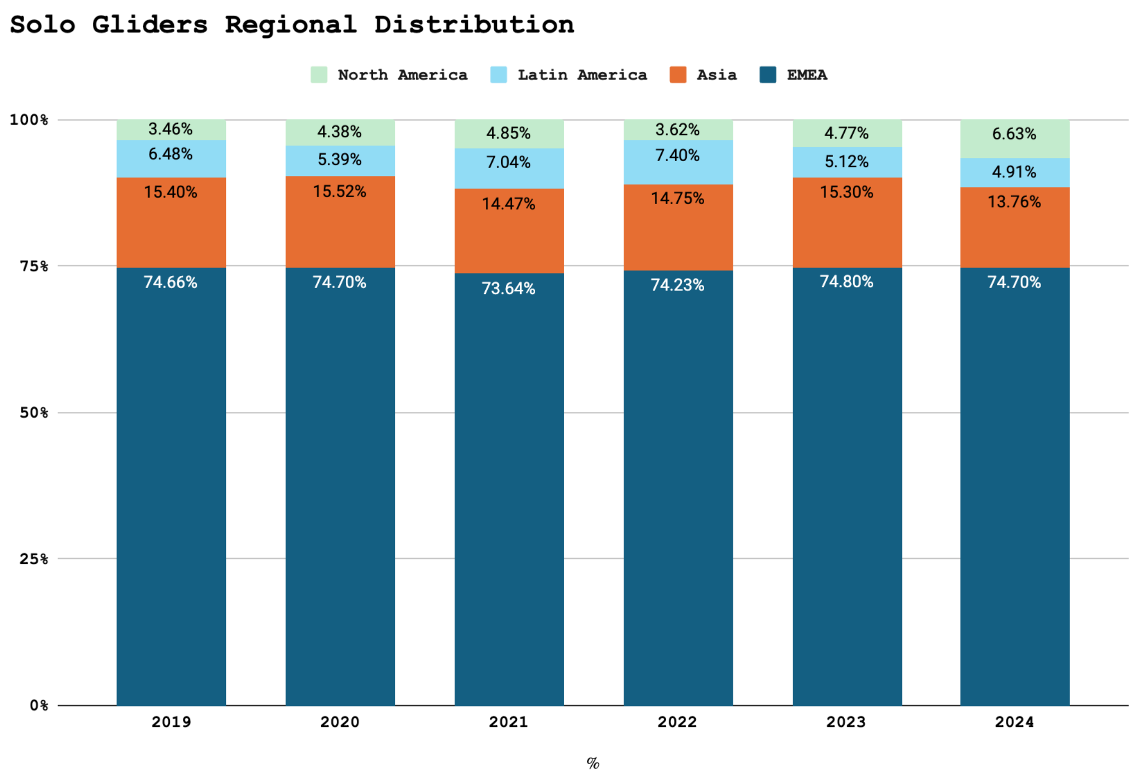
	2019	2020	2021	2022	2023	2024
Solo Paragliders	33217	31557	38346	41642	34153	33481
Tandem Paragliders	3642	2597	2776	3808	3020	2302
Powered Paragliders	4415	3996	4808	5686	4137	3565
TOTAL	41274	38150	45930	51136	41310	39348



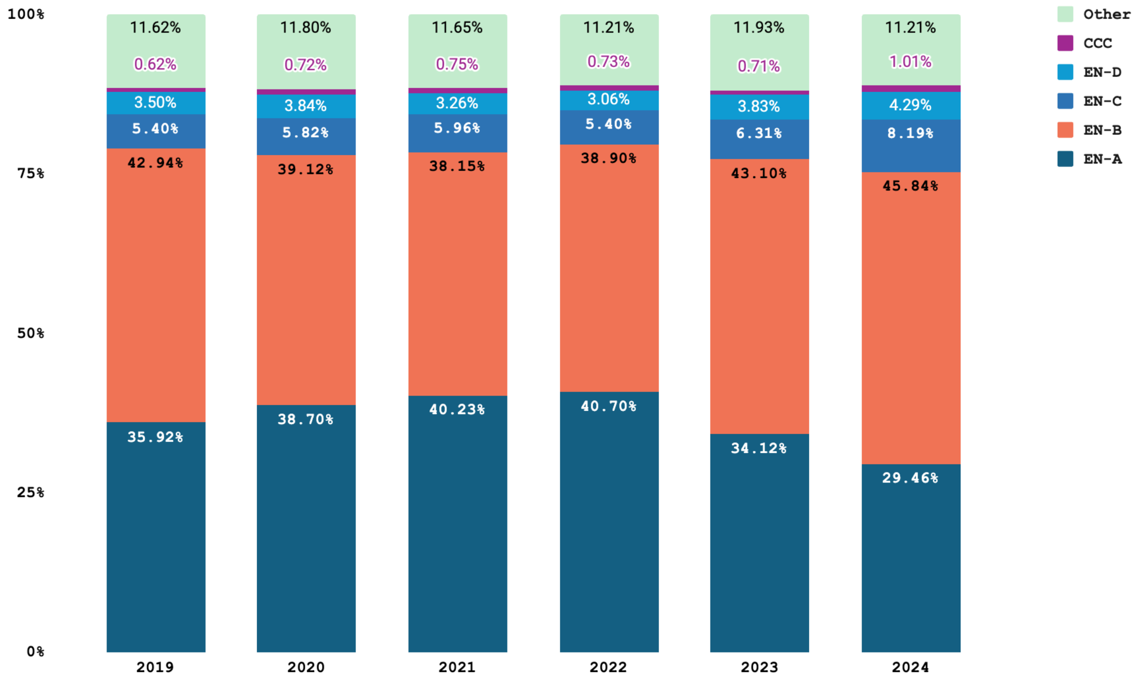
Regionally, most of the demand continues to comes from the EMEA region (72.4%), followed by Asia (13.9%). North American market grew both in solo paragliders and in powered paragliders, totaling 7.7% of the total paraglider market, trailed by Latin America (6%).

Solo Paragliders

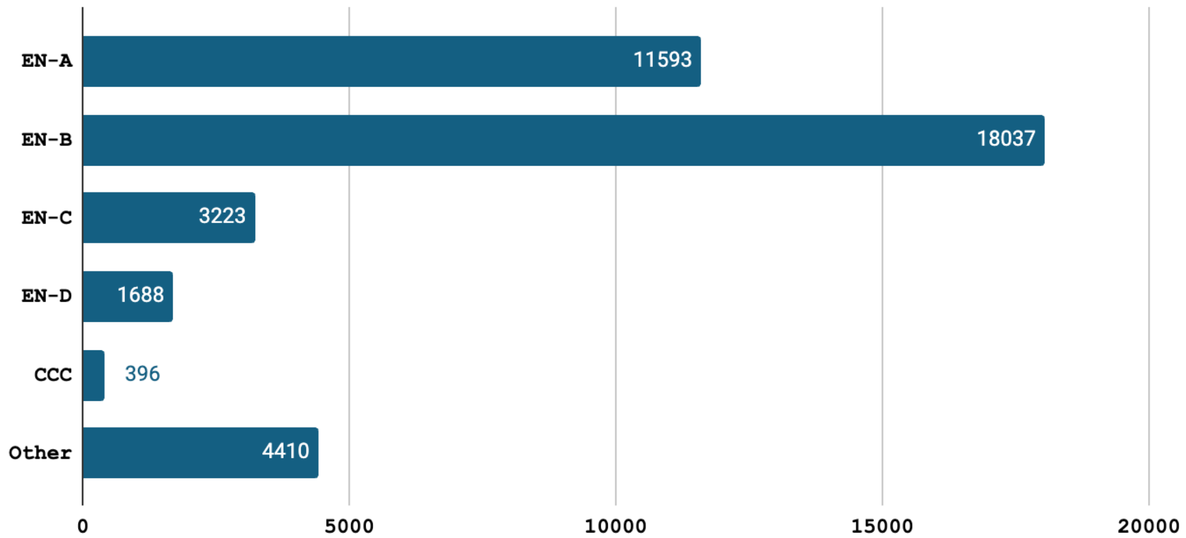
Solo gliders make up consistently around 85% of the total paraglider market by type, slightly higher than the 2023 data. In 2024, it is estimated that a total of 33481 units were sold, a 1.5% decline from 2023. In terms of regional distribution, we see a slight growth in North America and a slight contraction in Asia. EMEA and LATAM remained relatively stable in terms of demand.



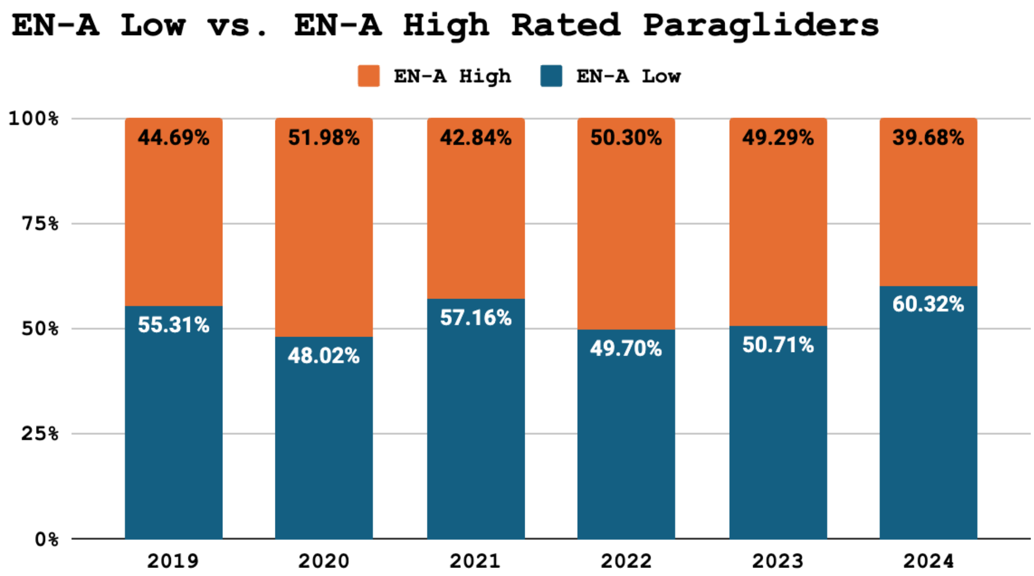
Worldwide paraglider market by classification (% units)



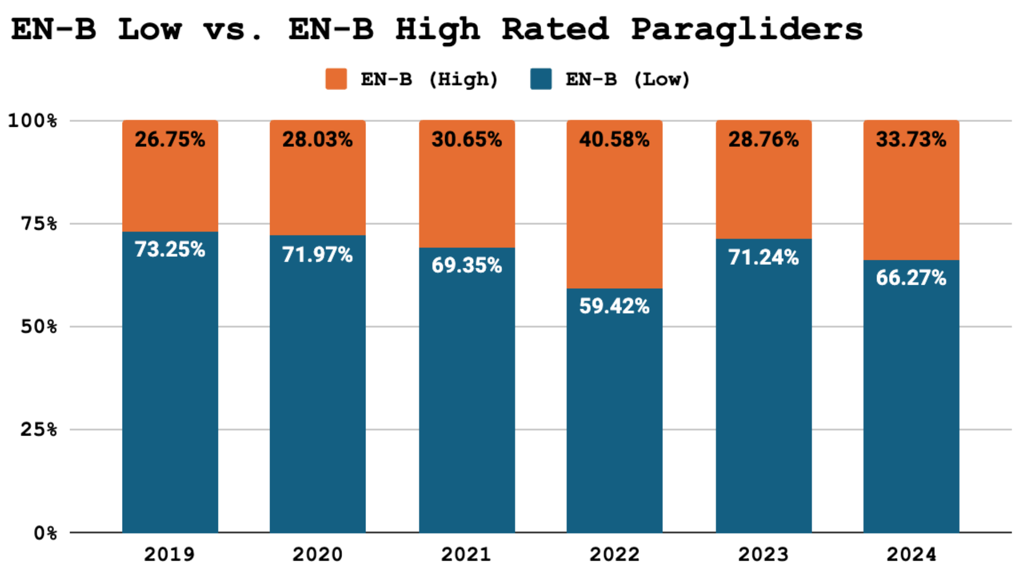
Paraglider market by rating (Unit Volume)



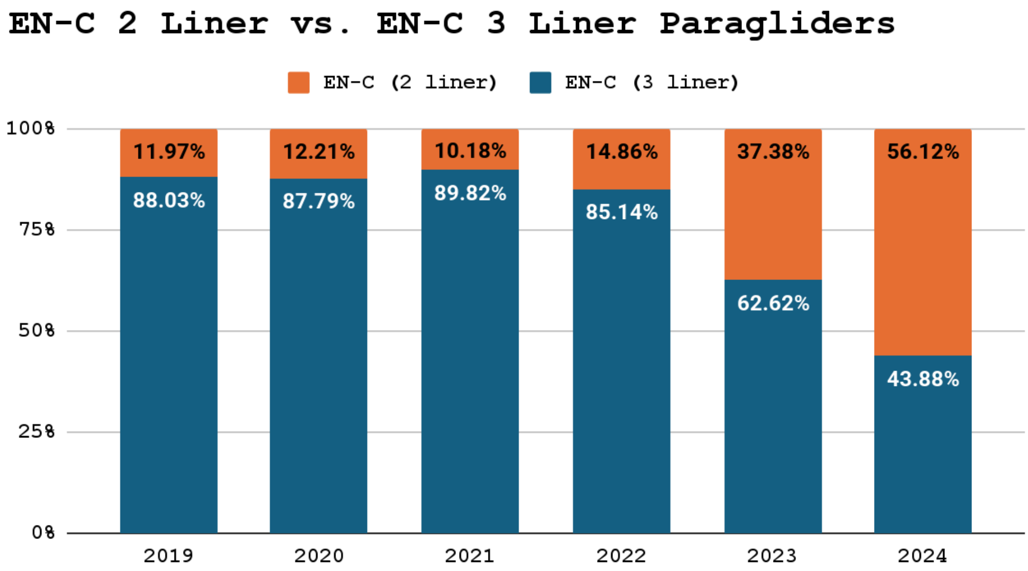
While during the pandemic the EN-A gliders gained in popularity (likely due to an influx of new entrants in the sport), the trend has reverted and over the past 2 years EN-B gliders is the largest segment, totalling 45.8% of the total gliders sold, possibly attributed to a generation of pilots trained during the pandemic that graduated to higher rated gliders. EN-C glider segment also grew to ~8.1% and EN-D to ~4.3%. Other or uncertified gliders total ~11.2 % of the market while CCC gliders total ~1% of the total market.



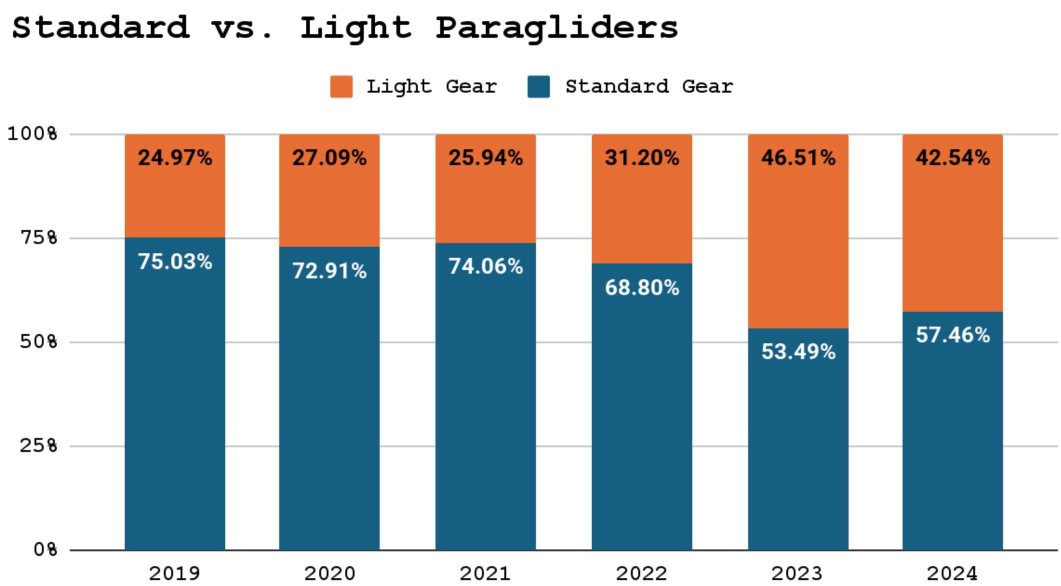
Taking a closer look at the EN-A category, we see a relatively balanced demand between EN-A Low and EN-A High type gliders, at roughly 55/45% split for EN-A low gliders across the years. While paragliding schools usually provide a relatively steady baseline demand for EN-A gliders, a spike (like during the pandemic) or a drop as seen in 2024 likely correlates with the number of new pilots taking up the sport and can be a leading indicator of future market performance.



In the EN-B category, we see a trend for the higher demand in high passive safety EN-B Low type gliders, making up around 66% of the EN-B glider market.

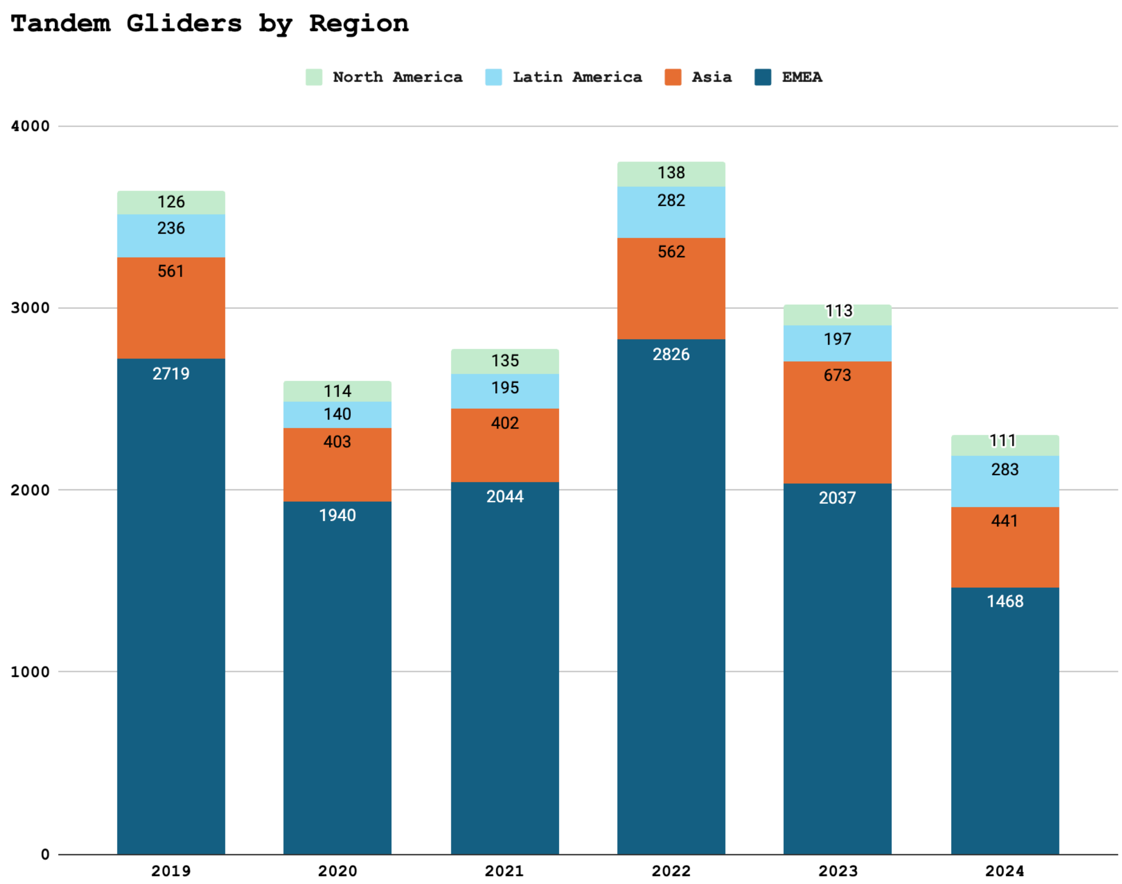


In the EN-C category, we see a significant adoption growth in the 2-liner version of the EN-C gliders, as more and more gliders of this type enter the market. In 2024, it is estimated that more than 56% of the paragliders sold in the EN-C category are 2-liner models.



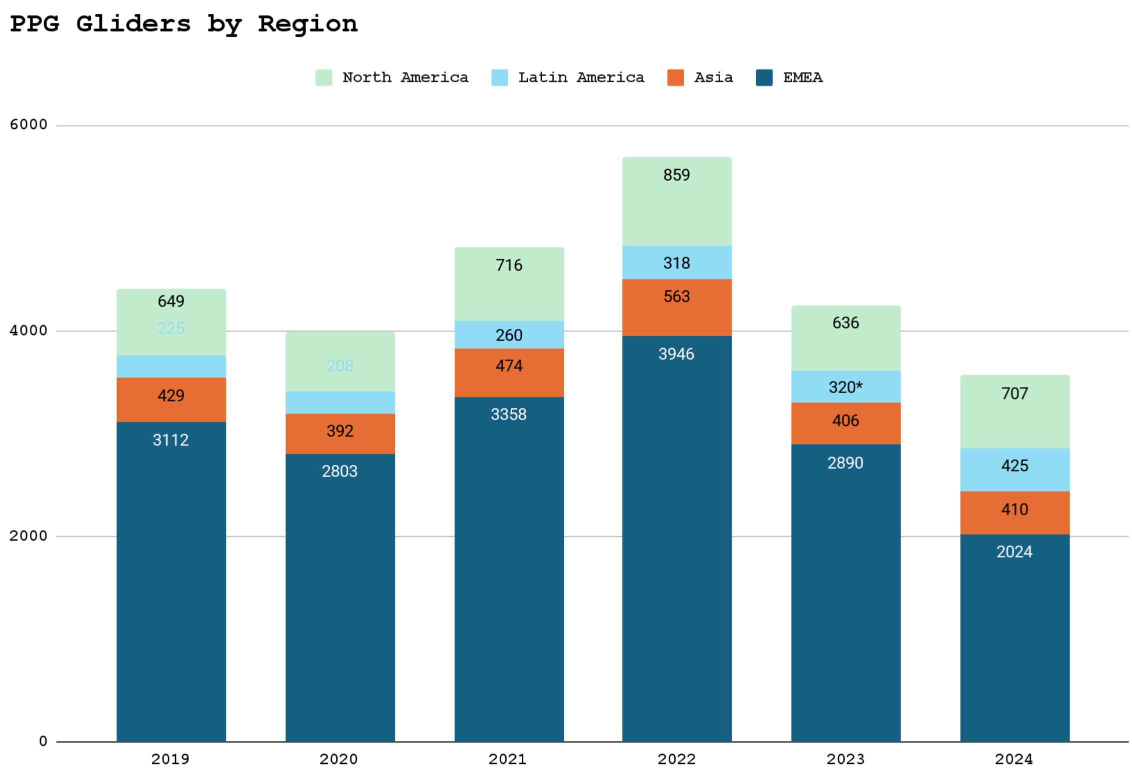
In terms of paraglider weight and materials used, we noticed the steady growth in the light gear glider category stabilized, light paragliders making up over 42% of the market in 2024.

Tandem Paragliders



Tandem paragliders saw a significant -23% decline in sales in 2024, largely in the EMEA and Asian markets. The tandem paraglider category makes up ~5.85% of the market compared to 7.3% in 2023. Given the higher relative price-point of the tandem gliders compared to solo gliders, this had a disproportionately larger effect in the total market revenue for paragliders in 2024.

Powered Paragliders



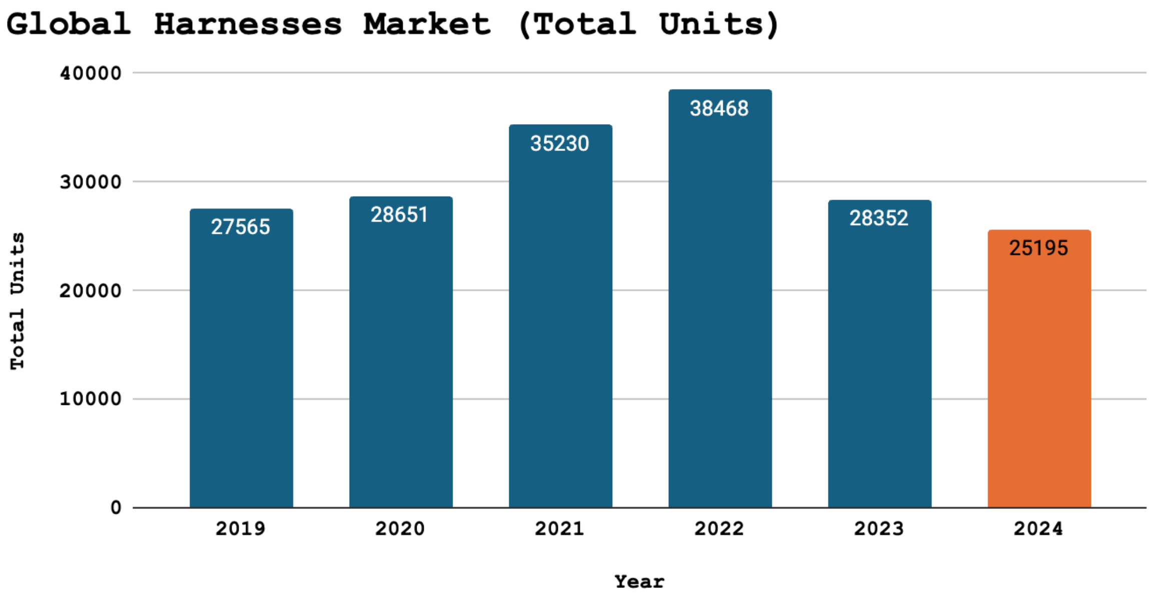
Powered paraglider segment makes up, ~9% of the overall glider market, slightly declining in 2024 compared to ~10% of the total market in 2023. In 2024 it is estimated that a total of 3565 powered paragliders have been sold.

Regionally, demand in EMEA is still high, close to 63% of the market, though it exhibited a significant decline in units sold. The Latin American region has seen significant growth in 2024, growing ~+30% from an estimate of 320 units in 2023 to 425 units in 2024*. The North America region continues its constant growth.

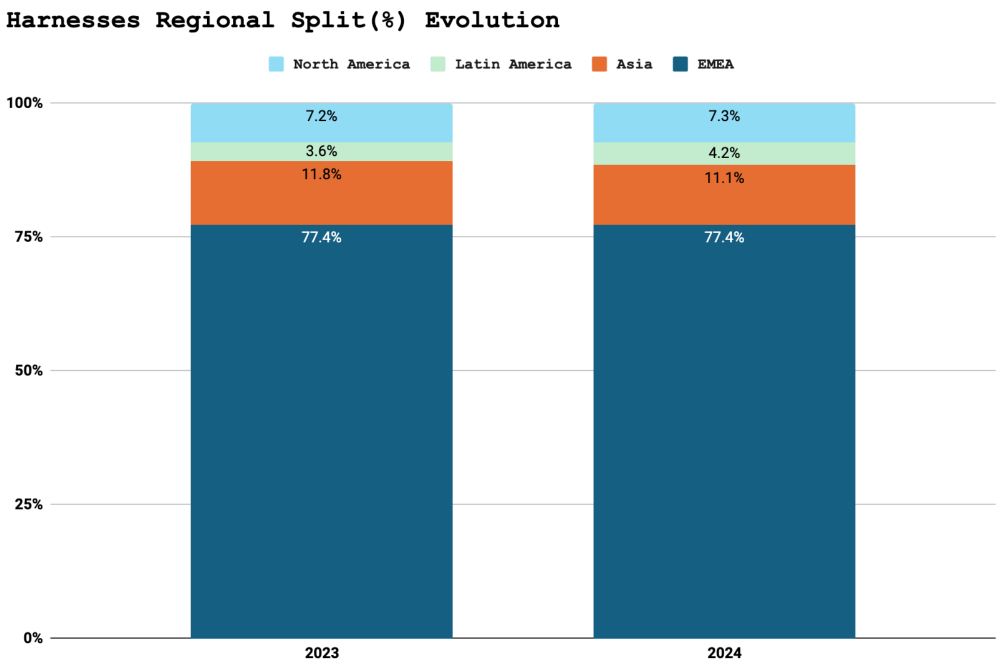
** The Latin American region 2023 data has been revised upwards from last year's report estimate of ~205 to ~320 units. The increase is attributed to under-reporting by some key players in the market last year.*

Harnesses

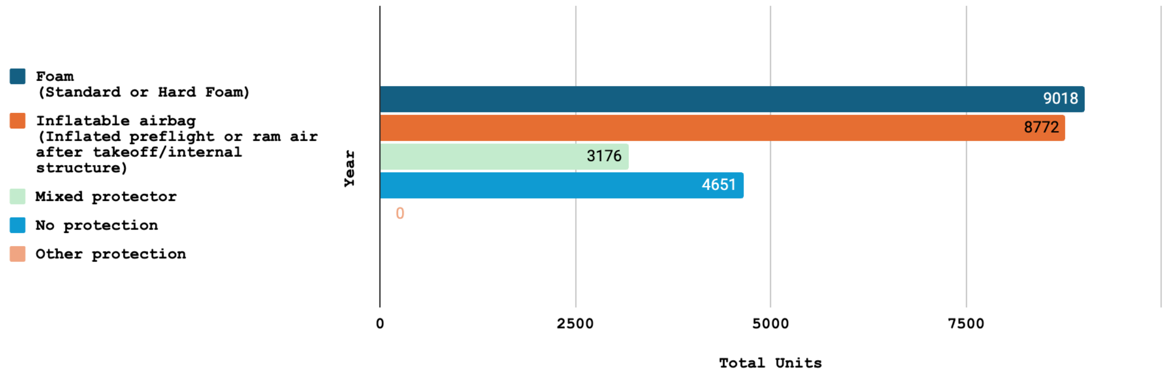
The paragliding harness market had a ~9% decline in units sold for 2024, totaling an estimate of 25195 units sold.

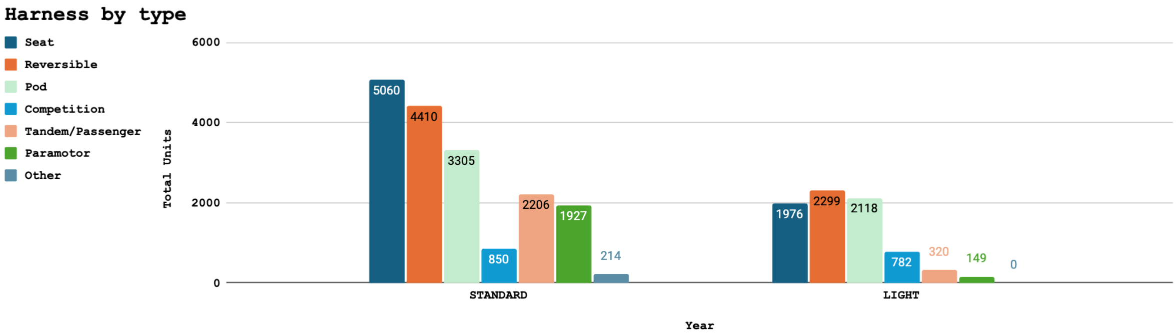


Regionally, EMEA is the largest market, capturing 77.4% of the demand in 2024 (on par with 2023), followed by Asia-Pacific with 11.1% (slight decline from 11.8% in 2023), North America with 7.3% and Latin America with 4.2%.

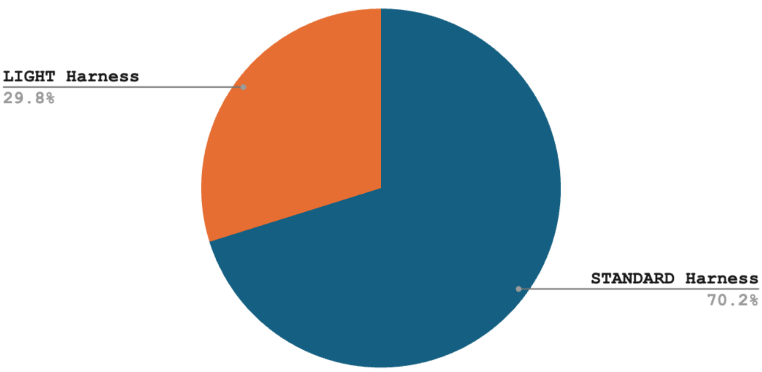


Segmenting the market based on protector type, we notice that Foam protection and Inflatable airbags are the most popular protector types, on average making up 35.2% and 34.2% of the harness market, respectively.





Traditional seat harnesses and reversible harnesses are the largest segments in the harnesses market, making up 27.5% and 26.2% of the market in 2024. Pod harnesses make up 21.1% of the total units sold.



In 2024, standard harnesses were preferred (~70.2% of the units sold) over light harnesses (29.8%).

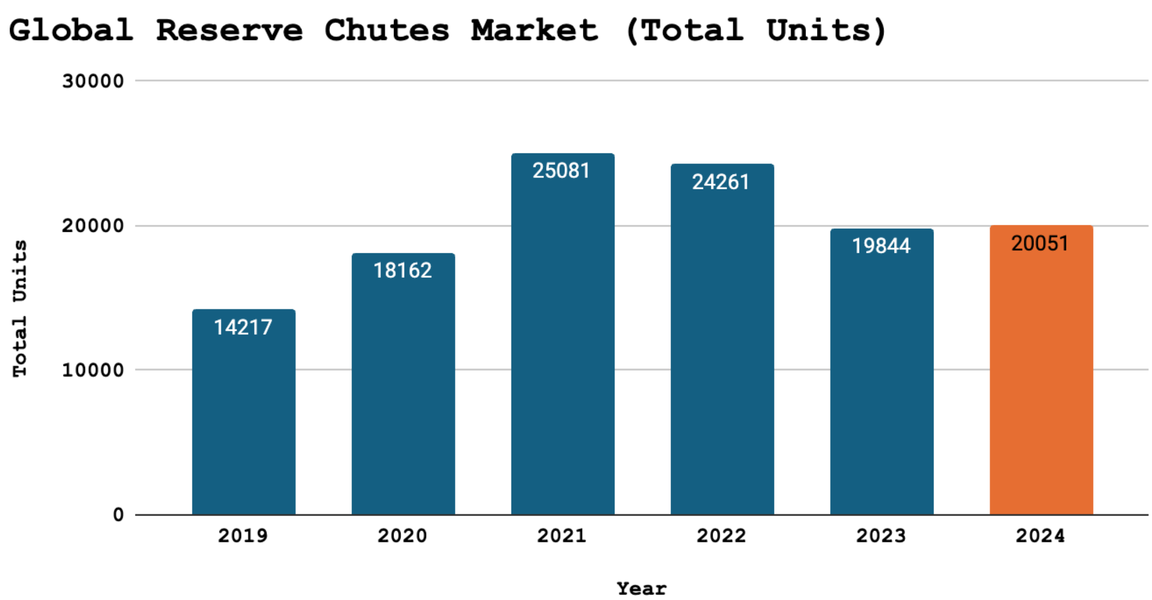
Table 2: Harness sales by type (Unit Volume, Est.)

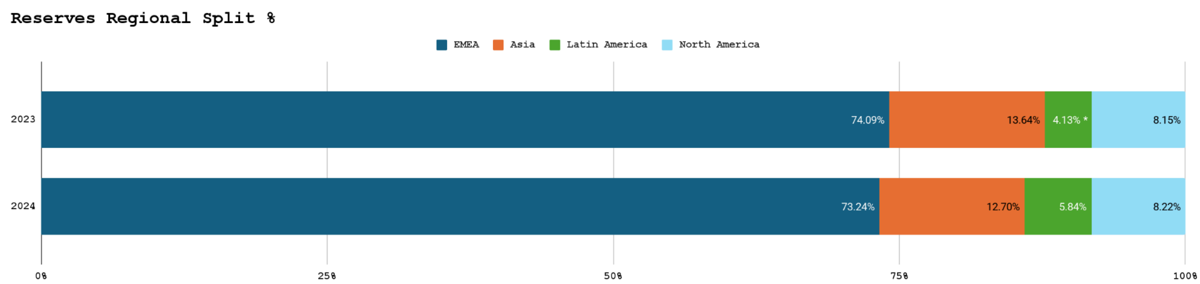
Harness	STANDARD	LIGHT *(up to 2kg for M size)*
Seat	5060	1976
Reversible	4410	2299
Pod	3305	2118

Competition	850	782
Tandem/Passenger	2206	320
Paramotor	1927	149
Other	214	0
Total	17973	7644

Reserve parachutes

The reserve parachute market has stabilised in 2024 after the significant 11.1% YoY growth 2019-2023, only showing a marginal 1% growth in 2024, up to an estimated 20051 units sold.





In terms of regional split, like in all other equipment classes EMEA drives 73.2% of the demand, followed by Asia with 12.7%, North America 8.2% and Latin America with 5.8%.

** The Latin American region 2023 data has been revised upwards from last year's report estimate of ~2.3% to 4.13%. The increase is attributed to under-reporting by some key players in the market last year.*

Looking ahead

In the past 5 years the worldwide paragliding equipment market has seen more volatility, stagnating in 2020, showing a sustained expansion in 2021 and 2023 and a significant contraction in 2023 followed by a moderate contraction in 2024.

Given the regular equipment life cycle, we expect the pandemic induced volatility in demand should stabilize in the next 2 years and resume to a lower than historical growth trend to 3-4% year over year, barring any significant macro-economic events impacting demand. If the low demand for EN-A gliders continues over the next few years, this could signal a lower influx of new pilots into the market and could further limit market growth.

Scope and Definitions

Paraglider sales volumes and units are for inflatable wings for foot-launched flight according to EN 926. Gliders with and without EN certification are counted. Included are powered paragliders (PPG) that have certification for powered flight. PPGs in this survey are paragliders manufactured for use only with a motor for powered flight, and paragliders shipped with modified risers for use with motors. No attempt is made in this study to estimate the number of “normal” paragliders that are flown with motors.

Figures in this study represent sales of “paragliding equipment”, meaning paragliders, powered paragliders, reserve chutes, harnesses and accessories. The figures represent sales (excluding sales tax) by primary paragliding equipment manufacturers to their normal sales channels, which are typically distributors, importers and flight schools. All sources are “origin sales”, meaning that they are counted in the country to which they are shipped by the manufacturer. “Destination sales”, meaning sales for countries to which equipment may be further exported either by channel partners or end customers, are not considered.

Harnesses are limited to those sold for use with paragliders or powered paragliders, with or without certification. For reserve chutes, only those specifically sold for use with paragliders are counted. The accessories category contains products directly relating to the sport of paragliding including paraglider rucksacks, concertina bags, tandem spreaders, and front containers. It does not include kites, tents, or any similar products produced by some manufacturers that are not directly related to paragliding.

How representative is this study?

Companies that reported the data represent an estimated 46% of the total market by revenue. The following companies participated in the study (in no particular order): Advance, Dudek, Skywalk, Sol, Swing, Woody Valley, Supair, BGD, Nova.

All unit sales are estimates - the methodology factors in current and past company reported data, and pilot demographic data and builds a projection of market size estimates by also factoring in the expected market consolidation tendencies.

Given the participation, the expected global market sizing accuracy is +/- 2%. While the methodology adjusts regional estimates for manufacturers that have a larger footprint in a certain geography - the regional estimates accuracy is within +/- 4%.

Appendix

Table 3: Paraglider sales 2024 by type & region (Unit Volume, Est.)

	Solo	Tandem	Powered
EMEA	25010	1468	2024
Asia	4608	441	410
Latin America	1643	283	425
North America	2220	111	707

Table 4: Worldwide paraglider sales by type (Unit Volume, Est.)

	2019	2020	2021	2022	2023	2024
Solo Paragliders	33217	31557	38346	41642	34153	33481
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TOTAL	41274	38150	45930	51136	41310	39348

Table 5: Paragliders (Solo, Tandem, PPG) - units sold (estimate)

	2019	2020	2021	2022	2023	2024
EMEA	30630	28316	33641	37684	30475	28413
Asia	6105	5694	6423	7268	6304	5459
Latin America	2615	2050	3154	3681	2152	2439
North America	1924	2090	2712	2503	2379	3037
TOTAL	41274	38150	45930	51136	41310	39348

Table 6: Solo Paragliders - units sold (estimate)

	2019	2020	2021	2022	2023	2024
EMEA	24799	23573	28239	30912	25548	25010
Asia	5115	4899	5547	6143	5225	4608
Latin America	2154	1702	2699	3081	1750	1643
North America	1149	1383	1861	1506	1630	2220
TOTALS	33217	31557	38346	41642	34153	33481

Table 7: Tandem Paragliders - units sold (estimate)

	2019	2020	2021	2022	2023	2024

EMEA	2719	1940	2044	2826	2037	1468
Asia	561	403	402	562	673	441
Latin America	236	140	195	282	197	283
North America	126	114	135	138	113	111
TOTALS	3642	2597	2776	3808	3020	2302

Table 8: Powered Paragliders - units sold (estimate)

	2019	2020	2021	2022	2023	2024
EMEA	3112	2803	3358	3946	2890	2024
Asia	429	392	474	563	406	410
Latin America	225	208	260	318	205	425
North America	649	593	716	859	636	707
TOTALS	4415	3996	4808	5686	4137	3565

Table 9: Harnesses by protector type - units sold (estimate)

Protector Type	2024
Foam *(Standard or Hard Foam)*	9018
Inflatable airbag *(Inflated preflight by pilot or Ram air after takeoff or through internal structure)*	8772
Mixed protector	3176
No protection	4138
Other protection	0